DISCOVER
workday@UCHICAGO

(Last Revised: 12/30/2014)

Quick Reference Guide: *Manage Delegations*

Keep in mind

- An employee is able to delegate their tasks to another worker who holds the same or similar role.
- You can specify the time period for which you would like the delegation to be effective.

Information Needed

- Begin and End Date
- Name of person the delegated tasks are going to
- Business processes to be delegated

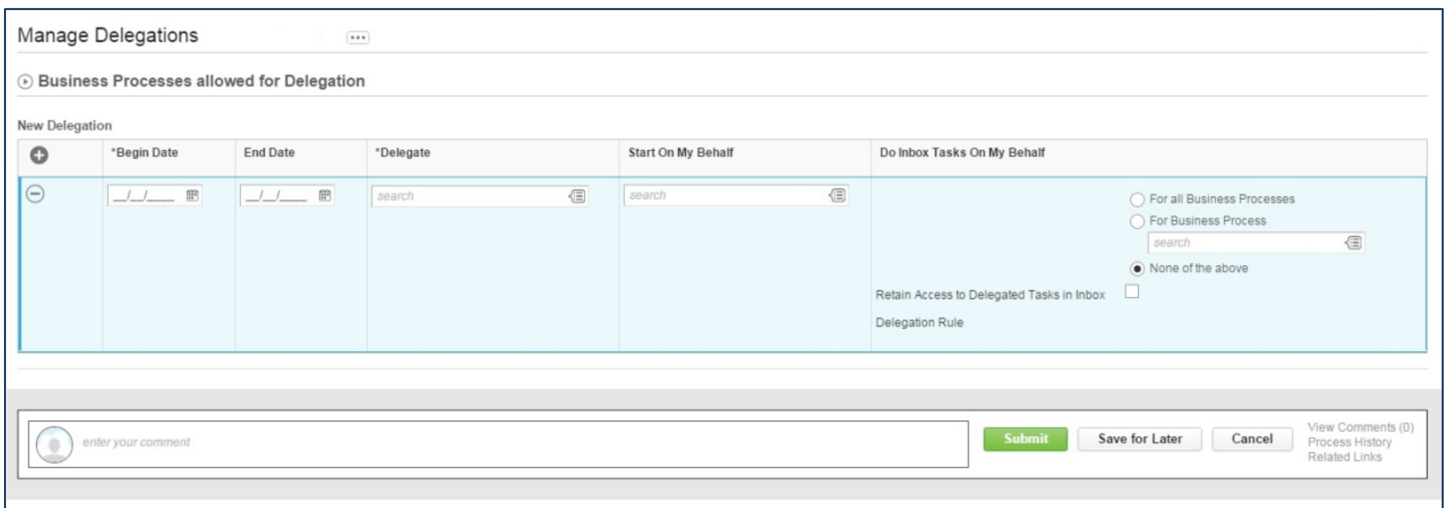
Steps:

You role should only be delegated to someone who holds the same or similar role to you (i.e. Budget Partners can delegate their role to an HR Partner in the same org). If there is another individual in your organization(s) that holds your role, you do not need to delegate since all of the same tasks will appear in their inbox. You can establish a timeframe for the delegation, as well as the specific business processes they want performed on their behalf.

1. From the **Search** field, enter *My Delegations* and click on the result.

2. View the **Current Delegations** tab to view existing delegations.

3. Click the **Manage Delegations** button.



4. Enter a **Begin Date** and **End Date** for the delegated task.

5. Use the **Prompt** icon within the **Delegate** field to select one or more delegates.

6. Use the **Prompt** icon within the **Start on My Behalf** field to select one or more delegates that can initiate a task on your behalf.

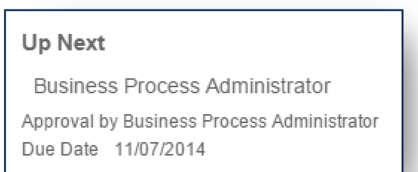
7. In the **Do Inbox Tasks On My Behalf** fields, select from the radio buttons one of the following choices:
   a. **For all Business Processes**
   b. **For Business Processes** – In this case, use the **Prompt** icon to select one or more delegates.
   c. **None of the above** – Leave this as the default if you wish to have no one act on tasks that come to your Workday Inbox.

   For Inbox actions, HR Partners can elect to delegate all business processes, only some, or none. This is very different than initiating business processes and should be treated as such.

8. Add additional rows by clicking the **Plus** icon for as many unique delegations you wish to add.

9. Click on the Submit Icon Submit to submit this task.

10. You can see who is **Up Next** in the process. In this case, the Employee you are performing the action on is up next.



11. Use the **Arrow** icon to review the **Details and Process** information.

12. Click the **Done** icon Done to complete this task.